CloudWinks

CLOUDWINKS · BUSINESS, FINANCE & COMMERCE

DealMaker

Technical brief

DealMaker gives sales and business development teams one place to run every deal, from the first opportunity through negotiation to the signed contract.

1. Architecture in brief

DealMaker is a CloudWinks app in the Business, finance and commerce group. Each record belongs to a company, and other companies cannot see it. It builds on Crux. Its screens, fields and menus are definitions, built by the same pipeline as every other CloudWinks app.

2. Service boundary and intake

DealMaker owns its own records. People and companies come from Crux rather than a separate user list, files are stored in MediaMogul and linked, and work that belongs to another app opens in that app.

3. Data handled

Deals and opportunities, pipeline stages, negotiation history and contracts.

4. Integrations and ownership

DealMaker uses the shared Crux record for every person and company in a deal, so counterparties are the same records the rest of the business already uses.

5. Security and access

Sign-in, roles and permissions come from KeyKook, and people and companies come from Crux. Each record belongs to a company, and other companies cannot see it. Any record shown through another app, a portal or a combined view still passes that app’s permission check, and money, security and company-account work always runs on the server.

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